

Yardley Great Trust

fighting poverty and providing high quality care and housing for older people in South East Birmingham

GRANTS FROM YARDLEY GREAT TRUST:

Guide for referral agencies

Old Brookside, Yardley Fields Road, Stechford, Birmingham B33 8QL
Telephone (0121) 784 7889 Fax: (0121) 785 1386
Web site: www.ygtrust.org.uk Email: enquiries@ygtrust.org.uk

*Committed to the Race Equality Code of Practice for Housing Associations
Registered with the Homes and Communities Agency as a Social Landlord
A member of the Housing Ombudsman Scheme
A member of the Almshouse Association
Registered charity number 216082*

Introduction

Yardley Great Trust is a charity with origins in the fourteenth century. The Trust aims to pay out £100,000 per year to individuals in need and to projects which benefit the community. The Trust also provides home care and a range of housing for elderly people: 194 dwellings within sheltered housing schemes, 29 bedspaces in a care home and 45 bedspaces in a nursing home.

The Trust's boundary

Due to the constraints of the Trust deed, the Trust can only help people who live within the ancient parish of Yardley, which includes the wards of Acocks Green, Hall Green, Highters Heath, part of Shard End, Stechford, Springfield, Sparkhill, Tyseley, Yardley and Yardley Wood. A map showing the Trust's operational boundary appears at [Appendix 1](#).

Referral agencies

Individuals/families cannot apply direct to the Trust. Every application from an individual must be checked and supported by a referral agency. A list of current referral agencies appears at [Appendix 2](#). Organisations wishing to be included on the list should apply to the Trust's office.

Projects giving benefit to the community

The Trust can consider applications for grant assistance in respect of projects which benefit the community. Applications in respect of projects should be made in writing direct to the Trust's office and should contain sufficient information to enable the Trustees to decide on the merits of the application. Further information concerning grant applications in respect of projects appears at [Appendix 3](#).

The Procedure Guide

The Trustees have requested that this Guide be produced to ensure that applications can be processed quickly for the benefit of applicants. A draft guide was produced and referral agencies invited to comment prior to the final version being issued. Any questions or comments concerning this Procedure Guide, or any aspect of grant making by the Trust, should be directed to the Trust's administration office.

Who is eligible to apply for a grant from the Trust?

Any person in need who lives within the ancient parish of Yardley can apply via a referral agency for a grant from the Trust. Refer to [Appendix 1](#) for a map showing the Trust's operational boundary. Queries over the boundary should be made to the Trust's administration office.

Are there any items for which the Trust will not pay a grant?

The Trust Deed requires that Trustees do not pay grants in respect of relief of rates, taxes or other public funds: therefore Trustees cannot pay grants to be used to pay, for example, council tax, nor can grants be paid in respect of expenditure which is the responsibility of the local authority or the government.

The Trustees have decided that grants will not be paid in respect of:-

1. footway crossings;
2. home improvement (redecorating excepted)
3. school clothing

Carpets

It is the policy of the Trustees that they will only consider grants to purchase carpets when the household consists of/ contains:-

1. a child under 10 years old or;
2. a disabled person or;
3. a person in receipt of a disability payment of some sort or;
4. an old age pensioner.

Amount of grants

There are no maxima or minima in respect of grant amounts.

Making applications

Applications must be made on through the online portal at www.ygt.org.uk.

Trustee Visits

On occasion, a Trustee or the Clerk may visit an applicant to discuss their application further. Please forewarn applicants that this is a possibility.

What happens when an application is received by the Trust?

Each application is checked to ensure that enough information has been given. If there is insufficient information, the applicant or the referral agency will be requested to provide the extra information required. The next stage depends on whether the grant application fits the criteria for "small grants" (see below). If the small grants criteria are not met, the application is listed for presentation at the next scheduled meeting of the Board of Trustees. The application is copied and sent to all Trustees along with other meeting papers one week prior to the date scheduled for the meeting. Trustees decide on awards at each meeting, following which arrangements are made for grants to be paid from the administration office.

Small grants

According to the Trust Deed, decisions on grants should be made only at a full Trustees' meeting (except in the case of emergencies - see below). However, the Charity Commissioners have given dispensation for certain small grants to be dealt with by the Clerk to the Trustees. Such grants have to meet the following criteria:-

Items to be purchased with grant moneys

The item/s for which the grant is paid must:-

1. be a necessity or;
2. have the potential to improve the person's quality of life or;
3. have the potential to reduce suffering or discomfort

Limits

The amount of the grant is not to exceed £250 per application. However, small grants cannot be paid to an individual who has received a small grant within the previous year.

The aggregate amount of small grants is not to exceed a figure determined annually by the Trustees (2014 - £8,000).

The Trust aims to notify decisions on small grant applications within one week of receipt. Grant applications that do not meet the above criteria must be considered by the Trustees.

Furniture

Applicants awarded a grant in respect of furniture may be required to purchase second hand furniture, either from community projects or a local second hand shop. In these circumstances, arrangements will be made with the referral agency or applicant as appropriate.

When do the Trustees meet?

Trustees meet monthly on the second or third Thursday. For information about specific dates, please contact the administration office. Applications must be received in the administration office at least ten days prior to the date of the meeting: any received after this time are held over until the following meeting except in an emergency when an application can be determined within three days of receipt and payment made by the following day. The Clerk to the Trustees has sole discretion on whether or not an application should be dealt with as an emergency.

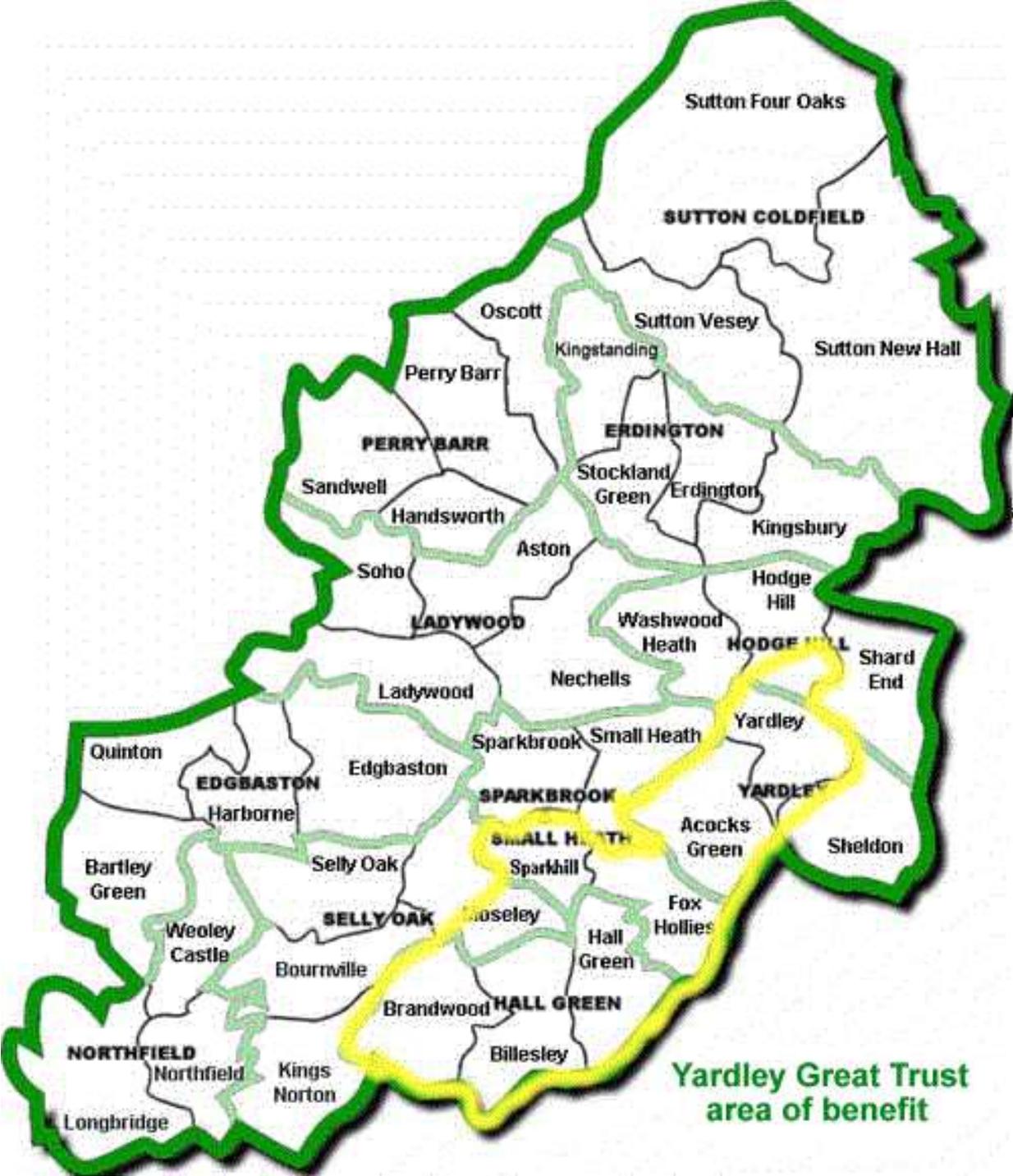
How long before a grant is paid?

For non-emergency cases, we aim to pay grants within two weeks of awards by the Trustees. Urgent cases will be given priority.

Further information

Any queries concerning grant applications or awards should be made in the first place to the Clerk to the Trustees, Mrs Karen Grice.

Appendix 1



Appendix 2: Authorised Referral Agencies

- Age UK
- Anglican Clergy
- Birmingham & District African-Caribbean Community Development Agency
- Birmingham Asian Resource Centre
- Birmingham Asylum Seekers Team
- Birmingham Women's Aid
- Birmingham Young Carers – Connexions
- Bordesley Green East Nursery
- British Refugee Council
- Citizens Advice Bureaux
- Crossroads (Caring for Carers)
- Harden Housing
- Health Visitors
- Healthwatch Birmingham
- Homestart Cole Valley
- Narthex
- Neighbourhood offices
- Priory House
- Probation Service
- Sahelia House
- Social Services Department
- Surestart
- Terrence Higgins Trust
- The Springfield Project
- Victim Support East Birmingham, Stechford Methodist Church
- Windows for Sudan
- YGT Trustees

Appendix 3: Grant Applications from Projects

The Trustees wish to encourage applications for grant in respect of projects which will benefit the community within the ancient parish of Yardley. Applications should be made in writing and should contain the following information where appropriate:-

- the aim/s of the project
- the client group/s and number of anticipated clients
- a “business plan”, or statement of anticipated progress for at least the next year, preferably three years
- revenue estimates for at least the next year, preferably three years
- a statement relating to other possible sources of financial assistance and the outcome of any other grant applications

Grant applications in respect of projects are considered by the Trustees at their monthly meetings. It is the Trust’s aim to notify the Trustees’ decision within one week.